



Change to a Lower Grade

Introduction

In EHRP, an employee can be moved to a lower grade. This chapter details the steps the user would take to process this position change. The first step is to process the appropriate personnel action (NOA 713-0) on the **Data Control** page. The next step would be to modify the position and compensation data.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

Navigational Path



Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ HR Processing

Or

Access the item using the Worklist.

Navigational Tips



- The  icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.
 - The  icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.
-

Position Number



Before beginning to process this action, be sure to make note of the position number to which the employee will be assigned.

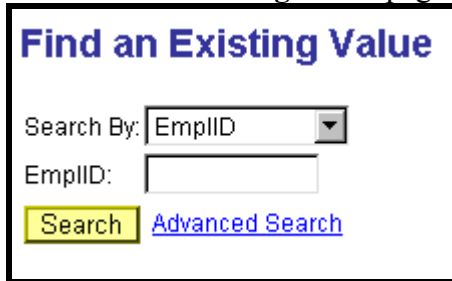
Procedure

The following steps detail the procedure for lowering an employee's grade:

- 1 Follow the navigational path:

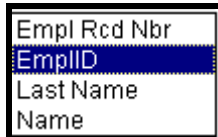
Home → Administer Workforce → Administer Workforce (USF) →
Use → HR Processing

The **Find an Existing Value** page appears.

A screenshot of the 'Find an Existing Value' page. It has a title 'Find an Existing Value' in blue. Below the title, there is a 'Search By:' label followed by a dropdown menu currently showing 'EmplID'. Below that is an 'EmplID:' label followed by a text input field. At the bottom, there is a yellow 'Search' button and a blue 'Advanced Search' link.

- 2 Select the variable you would like to **Search By** from the drop down list.

The search options include:

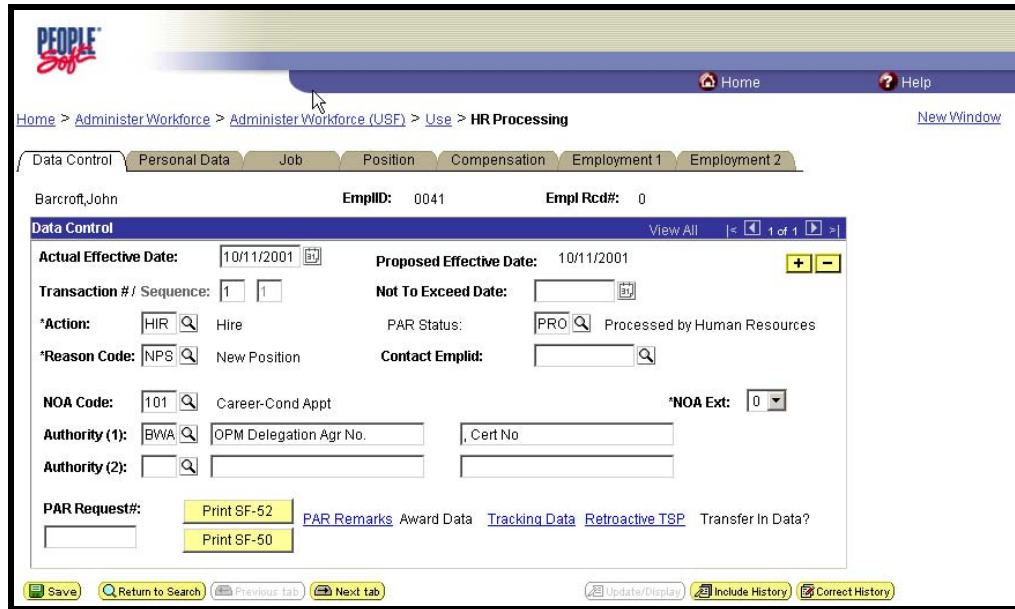
A screenshot of a dropdown menu showing search options. The options are 'Empl Rcd Nbr', 'EmplID' (which is highlighted in blue), 'Last Name', and 'Name'.

- 3 Enter the appropriate variable in the next field. (for example, Last Name)


- 4 Click .

- 5 Select the correct employee.

The following **Data Control** page appears:



*NOTE: The **Data Control** page will be populated with the most recent personnel action performed for the selected employee.*

- 6 Click the  in the **Data Control** box to insert another row into the employee's record.
- 7 Enter the **Actual Effective Date** of the change in the employee's grade.
- 8 In the **Action** field, enter "DEM."
- 9 Enter the applicable **Reason Code**.
- 10 Enter the **NOA Code** of "713" (Change to a Lower Grade).
- 11 Enter the **NOA Ext** (Extension).
- 12 Enter **Authority (1)**.
- 13 If applicable, enter the **Authority (2)**.
- 14 In the **PAR Request #** field, enter the applicable PAR Request number.

NOTE: This field is not required but can be used for PAR request tracking purposes.

- 15 To enter **PAR Remarks**, click the hyperlink of the same name.



The following **PAR Remarks** sub-page appears:

- 16 Enter the applicable **Remark CD (Code)** and tab out of the field to see the text of the remark.

NOTE: To add additional remarks, use the  to insert a row.

*NOTE: If the **Remark CD** contains a “*****”, you must replace the asterisks with specific information. (i.e. this field may prompt you to enter date)*

*NOTE: To enter a freeform remark, enter “ZZZ” in the **Remark CD** field. Enter applicable remark text in sentence format. Text should fill the line. Once the line is filled, move to the next line. There is no autowrap feature. Do not hyphenate across lines. If a word requires hyphenation, move it to the next line. Do not use bullets or dashes. The “ZZZ” remark can only be used once for each personnel action.*

NOTE: Within the EHRP system, there is no limit to the number of remarks that can be captured.

Mandatory Remarks



The system does not generate or suggest mandatory remarks that need to be entered in accordance with the NOA Code you are processing. Use the appropriate remarks based on OPM processing guidelines. There will no longer be HHS specific remarks for entry, except for the freeform ZZZ.

**Procedure
(cont'd)**

16

17

When you are finished entering your PAR Remarks, click **OK** to return to the **Data Control** page.

Click the **Job** tab.

The following **Job** page will appear:

PEOPLE Soft

Home > Administer Workforce > Administer Workforce (USF) > Use > HR Processing

Data Control Personal Data Job Position Compensation Employment 1 Employment 2

Barcroft, John EmplID: 0041 Empl Rcd#: 0

Job Data View All |< 1 of 1 >|

Effective Date: 10/11/2001 Transaction # / Seq: 1 PAR Status: Processed by Human Resources

Act Type: Hire NOA Code: 101 Empl Status: Active

Position: 00006726 GS- 0343- 09 PROGRAM ANALYST Posn Mgmt Rcd

*Job Code: 98H224 GS- 0343- 09 PROGRAM ANALYST Position Override

*Agency: HE Department of HHS Transferred From Agency:

*Sub-Agency: 11 Program Support Center Transferred To Agency:

*Business Unit: PSC00 Program Support Center Benefits/FEHB Data

*Department: PBJ DIVISION OF COMMISSIONED PERSONO FEGLI/Retirement/FICA

*Location: 241360031 Rockville Departmental Hierarchy

Tax Location: NA Not Applicable Detail

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

18

Enter the **Position** number.

NOTE: Be sure to select the position from within your business unit.

*NOTE: The following fields on this page will populate based upon the **Position** that you have entered:*

- **Job Code**
- **Agency**
- **Sub-Agency**
- **Business Unit**
- **Department** (used to be the “Admin Code”)
- **Location** (used to be the “GeoLoc Code”)
- **Tax Location**



Position Override



The **Position Override** checkbox will allow the user to modify the position management data for this employee. This function is to be used on a limited basis for extreme EXCEPTIONS. If the box is checked, the employee's data must be maintained manually, and automatic action functionality will be disabled for this employee record.

Procedure (cont'd) 19

Click the **Position** tab.

The following **Position** page appears:

The screenshot shows the 'Position Data' form with the following fields and values:

- Effective Date: [Empty]
- Transaction # / Seq: [Empty]
- PAR Status: Processed by Human Resources
- Act Type: Hire
- LEO Position: [Empty]
- POI: [Empty]
- *Pay Group: [Empty]
- Pay Frequency: [Empty]
- Work Period: [Empty]
- Holiday Schedule: [Empty]
- Earnings Program: [Empty]
- *Employee Type: [Empty]
- Employee Classification: [Empty]
- *Reg/Temp: Regular
- Supervisor Level: [Empty]
- Medical Officer: [Empty]
- *Standard Hours: [Empty]
- FTE: [Empty]
- *FLSA Status: (Invalid Value)
- *Job Indicator: Primary
- *Adds to FTE Actual Count: [Empty]

The form also includes a 'Save' button, 'Previous tab' and 'Next tab' buttons, and an 'Add' button.



NOTE: The following fields will populate based on the position selected:

- **LEO Position**
- **Regular Shift**
- **POI**
- **Pay Group**
- **Work Period**
- **Holiday Schedule**
- **Reg/Temp**
- **Posn Occupied**
- **Work Schedule**
- **FLSA Status**
- **Supervisor Level**
- **Medical Officer**
- **Standard Hours** (Also known as Base Hours. Be sure this value is per week)

20 If applicable, click the **SF-113G Ceiling** checkbox.

21 Select the **Employee Classification** from the dropdown menu.

NOTE: This field is only used for Indian Preference.

22 Select the **Type Appt** from the dropdown menu.

23 Select the **Job Indicator** from the dropdown menu.

24 Click on the **Compensation** tab.

The following **Compensation** page appears:



NOTE: The following fields default based upon the new position selected:

- **Pay Basis**
- **Pay Plan**
- **Table**
- **Grade**

25 Select the **Pay Rate Determinant** from the dropdown menu.

26 Enter the **Step**.

NOTE: The page can not be saved until the Step is entered. After the Step is entered, the following fields will populate:

- **Step Entry Date**
- **Base Pay**
- **Loc/LEO Adjust**
- **Total Pay**
- **FEGLI Base**

*NOTE: If the employee is receiving retained pay, enter the retained pay plan, retained pay table, and retained pay grade in the **Rtnd PP/Table/Grade** fields respectively.*

27 Enter the step for the retained pay in the second **Step** field.

28 If the employee is an annuitant, enter the **Annuity Offset Amount**. This amount should be entered based on the employee's compensation frequency. If the employee's compensation frequency is annual, the annuity offset amount should be an annual amount.

Pay Impacts

The annuity offset amount must be entered correctly in order to avoid significant payroll issues



Procedure (cont'd)

29

Click on the **Employment 1** tab.



The following page appears:

Employment Data 1

EmpID: NEW Empl Rcd#: 0

Effective Date: 04/11/2002 Transaction #/ Seq: 1 PAR Status: Processed by Human Resources

Act Type: Hire NOA Code: 100 Empl Status: Active

EOD Dt: Hire NTE Dt: Mand Retire Dt: Exp Dates Filling Position Data

Rehire Dt: Separation Dt: Next Review Dt: Appt Data

Service Computation Dates

*Leave: 04/11/2002 Retire: 04/11/2002

RIF: 04/11/2002 TSP: 04/11/2002

LEO: Sev Pay: 04/11/2002

Service Conversion Dates

Conv Begin Date:

Career Conv Date:

Career-Cond Conv Date:

Within-Grade Increase Data

WGI Status: Waiting Non-Pay Hours WGI: 0.00 Last Increase Dt:

WGI Due Date: LEI Date: Intermittent Days Worked: 0

Save Previous Tab Next Tab Add

30 Click the **Filling Position Data** hyperlink.

The following sub page appears:

Filling Position

EmpID: NEW Effective Date: 04/11/2002

Date:

Filling Position Data

Position Filled By: Career Ladder Promotion

OK Cancel

31 From the dropdown menu, select the correct method by which the position has been filled.

32 Click **OK** to return to the **Employment 1** page.

33 Click the **Appt Data** hyperlink.



The following sub-page appears:

Appointment Info

Nature of Action Code:

Current Appointment Auth #1:

Current Appointment Auth #2:

Benefit Record Number: **Severance Pay Previous Weeks:**

Appointment Limits

Amount: **Hours:** **Days:**

Special Employment Program:

Welfare to Work:

- 34 If applicable, from the dropdown menu, select or modify the **Special Employment Program**.

NOTE: This is where the Special Program ID would be entered.

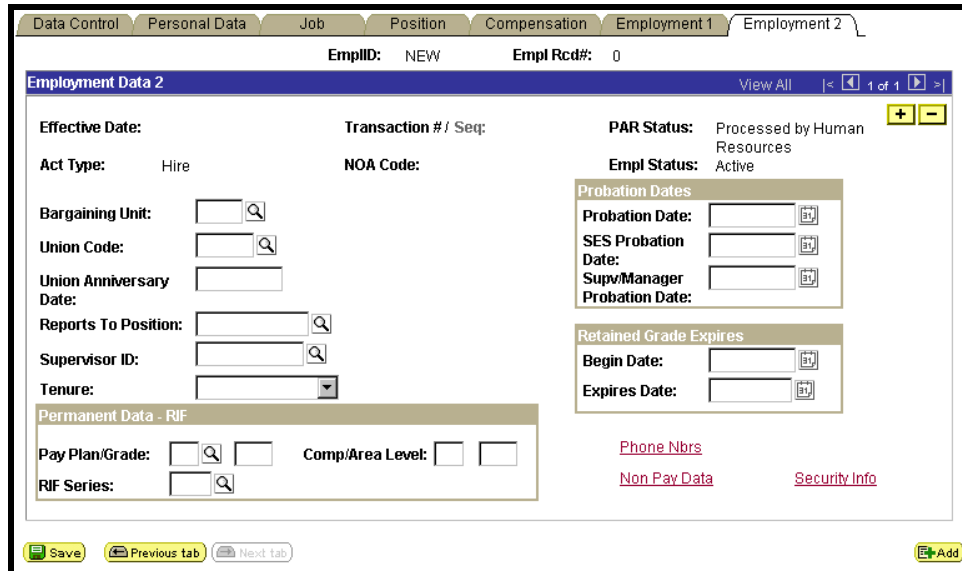
*NOTE: **Welfare to Work** should not be captured here.*

- 35 Click to return to the **Employment 1** page.

- 36 If applicable, modify the **Within Grade Increase Data**.

- 37 Click on the **Employment 2** tab.

The following page appears:



NOTE: The following fields default based on the position selected:

- ***Bargaining Unit***
- ***Reports To Position***

- 38 Enter the employee's **Union Code**, if applicable.
- 39 Confirm or enter the appropriate **Reports To Position** for the employee.
- 40 In the **Tenure** field, select the appropriate type of tenure.
- 41 As applicable, enter the employee's compensation level in the **Comp Level** field.

NOTE: In EHRP, the Comp Level is a 3 digit code. Therefore, when a user enters a 3 character Comp Level Code, the Payroll Interface will automatically add a "0" to the beginning of the Comp Level Code when transmitting that data to Payroll

NOTE: Users should no longer enter any data related to the Comp Area Field. The entire Compl Level code should be entered into the Comp Level field only.

- 42 In the **Probation Date**, enter the completion date for the employee's probation, if applicable.

NOTE: If this employee is a SES or Supervisor/Manager enter the probation completion date in the appropriate field.



43 As applicable, enter the employee security information in the Security Info hyperlink.

44 Change the **PAR Status** according to your role.

45 Click  .

NOTE: When saving a Change to a Lower Grade action, you will receive a warning regarding the WGI due date.
